

AMS infoADVANTAGE

AMS infoADVANTAGE Supervisor

Presented by CGI-AMS

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Agenda

- Overview
- User set up
- Security Set Up
- Configuration
- Exercises



Business Object Tools

- **Supervisor**
 - Security access
- **Designer**
 - Create/Maintain Universes
 - Universe: Grouping of tables. Defines what fields can be used in reports
- **Business Objects Reports viewer/creator:**
 - ‘Thick Client’
 - Create/run complex reports
 - Installed on your machine
- **WebIntelligence:**
 - ‘Thin Client’ or WebI
 - Run any kind of report
 - Online reporting piece

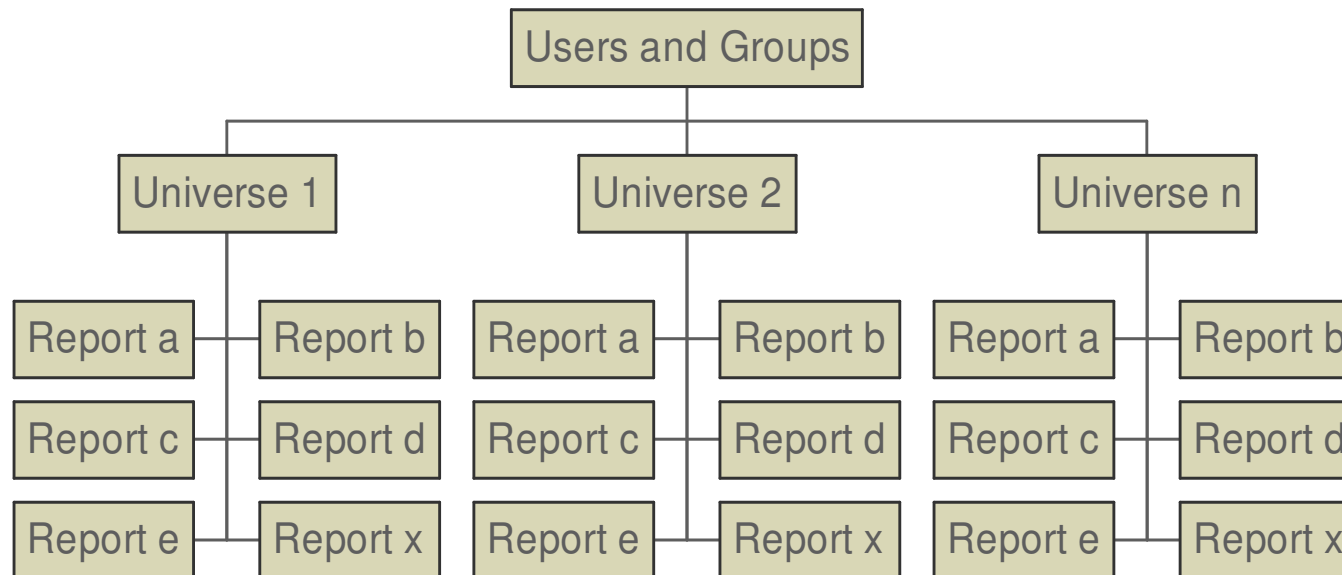


Supervisor

- Where security for *infoADVANTAGE* is maintained
- Defines
 - Database connections
 - User rights, by setting up user profiles or groups
 - Login rights
 - Action rights (create, modify, delete)
 - Security
 - Restrict reports/universes that can be accessed by user
 - Restrict certain data to be returned for certain users
- Visual representation of the repository
- Used by Systems Administrator



Supervisor Architecture Model



Key Concepts

- Business Objects stores data in the Repository database. Supervisor connects to the Repository to update security information.
- There are a limited number of users that have permission to use Supervisor.
- infoADVANTAGE user accounts will become locked after three consecutive unsuccessful login attempts.
- If all user accounts with permission to use Supervisor become locked, your site will be unable to manage Business Objects security.

Machine setup

- In order for Supervisor to work correctly, the following steps must be completed
 - The software is installed on the client machine
 - The BOMain.key is accurate (The address of the security domain must be recognized by all workstations using Business Objects products in client/server mode, so that all users can communicate with the other domains of the repository in a transparent manner. This address is contained in the key file, which is created at the same time as the security domain, and which must be distributed to all authorized users.)
 - C:\Program Files\Business Objects\BusinessObjects Enterprise 6\locData
 - The tnsnames.ora or ODBC or other connection information must be created
 - If using Oracle, an oracle client must exist and the sqlnet.ora file needs to be renamed to sqlnet.ora.orig

Supervisor Planning

- **Decisions about infoADVANTAGE security should be made before using the Supervisor tool. Group permissions and assignments should be well thought-out prior to performing actions covered in this course.**
- **Difficult part is coming up with the security model**

User and Group Setup

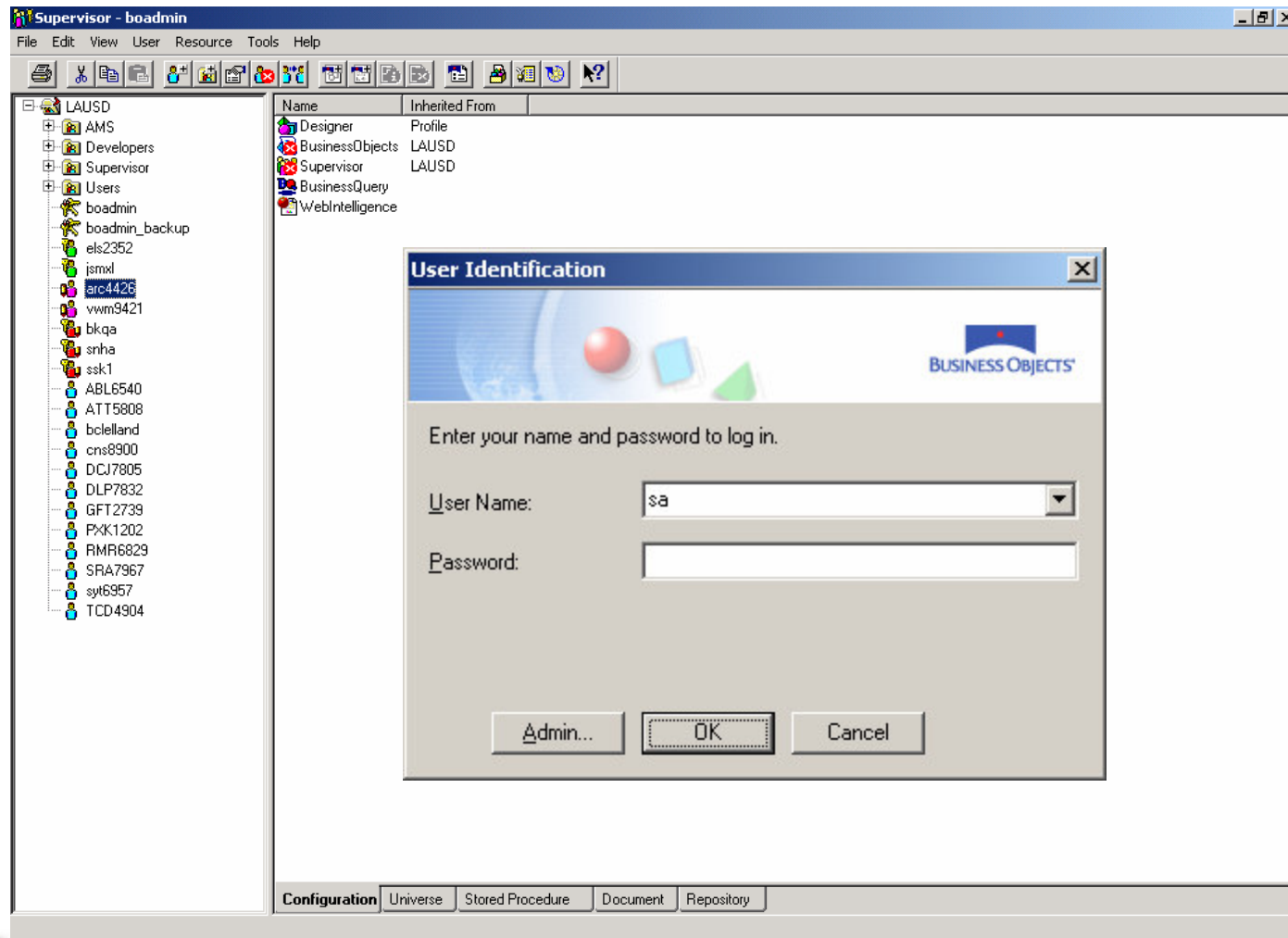


Supervisor – user set up & maintenance

- Users set up by groups or individual level
- Groups
 - Sets of users who share the same profiles
- Inheritance
 - A user is always in at least one group
 - They inherit the default rights of that group
 - Group inherits the rights of parent group
 - All users will belong to the root group (created during installation)
- Customization
 - Users may be granted other rights in addition to those inherited from the group

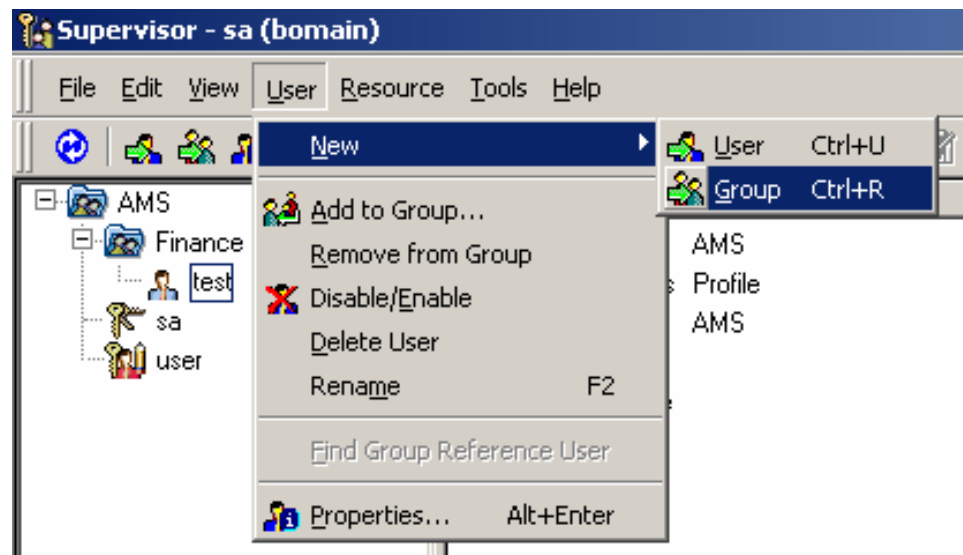


Supervisor – Initial screen

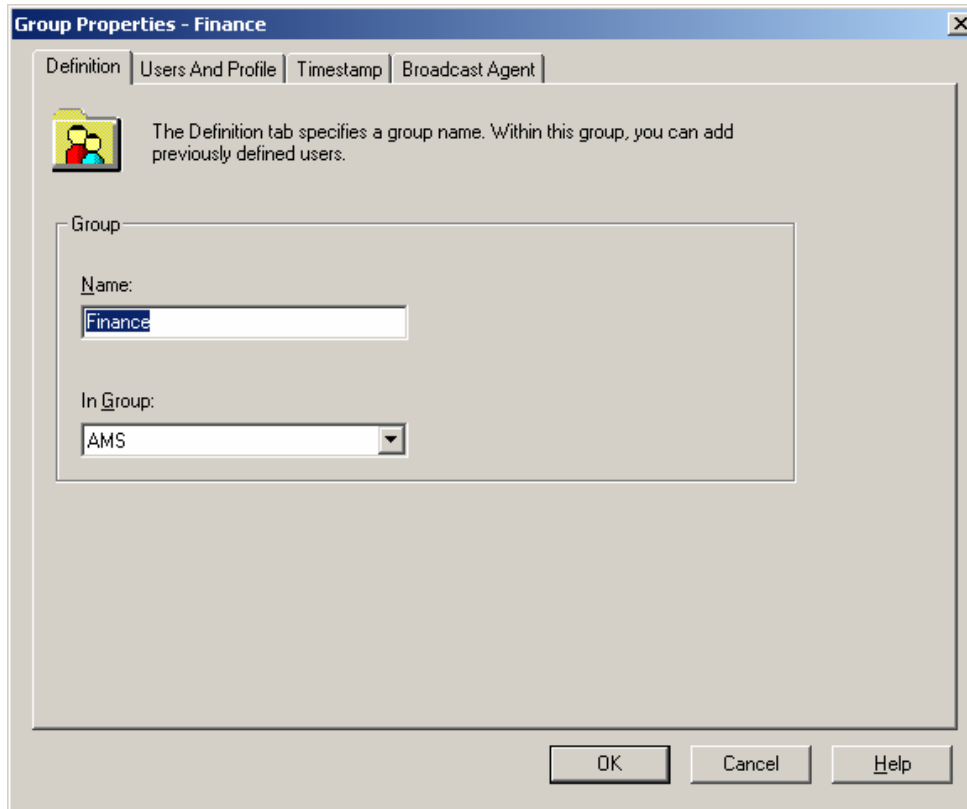


Supervisor – Creating a group

- Each user must be assigned to a group
- Use a consistent naming convention for groups and users
- Create groups before creating new users



Supervisor – Creating a group



Group Properties - Finance

Definition | Users And Profile | Timestamp | Broadcast Agent

The Definition tab specifies a group name. Within this group, you can add previously defined users.

Group

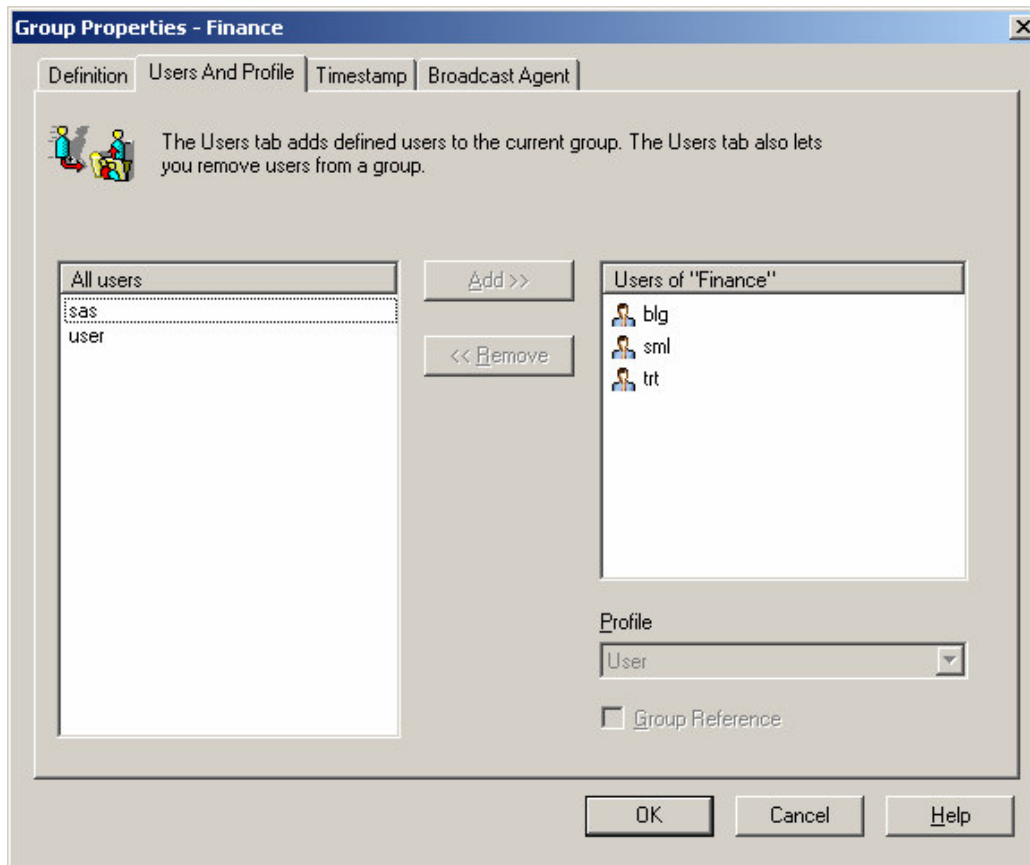
Name: Finance

In Group: AMS

OK Cancel Help

- Sub groups allowed
- Define users that belong to this group
- Add timestamp if needed
- Add Broadcast Agent information if needed

Supervisor – Creating a group – Cont'd



- Add users and their profiles
- Users can be in multiple groups
- Choose profile to set application access
 - Supervisor
 - Supervisor-Designer
 - Designer
 - User
 - Versatile

Different Types of User Profiles

- General Supervisor
 - All products
- Supervisor
 - All products but designer
- Supervisor-Designer
 - All products
- Designer
 - All products but supervisor
- User
 - All products but designer & supervisor
- Versatile Use
 - Configurable

Products:

- Business Objects
- WebI
- Supervisor
- Designer

Supervisor – Creating a group – Cont'd

The screenshot shows the 'Group Properties - Finance' dialog box with the 'Timestamp' tab selected. The dialog has four tabs: 'Definition', 'Users And Profile', 'Timestamp', and 'Broadcast Agent'. The 'Timestamp' tab contains a text box explaining its function: 'The Timestamp tab determines when a group can log in to an assigned BusinessObjects application. You can either select predefined settings or define your own.' Below this, there are three sections: 'Start/End Date' with 'Begin' and 'End' date pickers (both set to 11/16/2004), 'Start/End Time' with 'Begin' and 'End' time pickers (both set to 1:24:09 PM), and 'How' with a dropdown menu set to 'Monday'. To the right of these sections are three buttons: 'Add >>', 'Replace >>', and '<< Remove'. On the right side of the dialog is a large empty list box with a header row containing 'Timestamp' and 'Inherit...'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

- Set time frame/period when users can login
- Group timestamp overrides user timestamp
- Several timestamps can be added at the same time
- Timestamp can be any combination of Date/Time/Day/Month
- Timestamp will not log out users if they are already logged into the application

Supervisor – Creating a group – Cont'd

- BCA is a tool that allows users to process and distribute documents automatically and securely at scheduled dates and times
- Only a select few should use since sending reports to users
- Define if group will have BCA access

Group Properties - Finance

Definition Users And Profile Timestamp Broadcast Agent

The Broadcast Agent tab specifies a user name and password the user must enter when starting the Broadcast Agent application.

User

☐ Broadcast Agent ☒ No Broadcast Agent

Name: Group Reference User:

Security

Password: Confirm Password:

Properties

☐ Disable Login ☐ UNIX-only Broadcast Agent

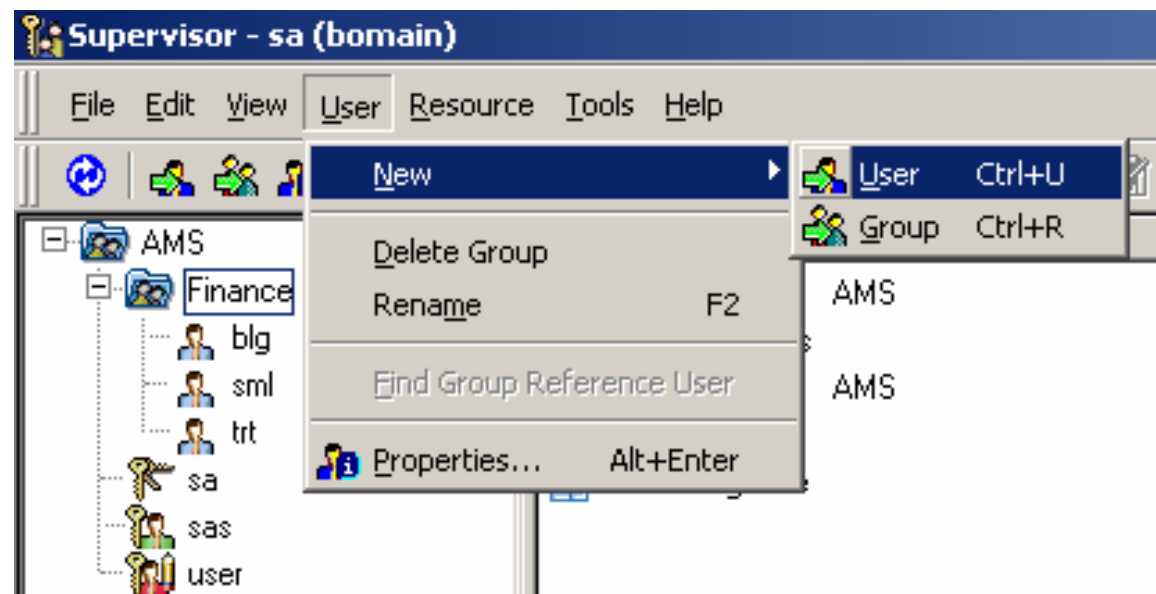
Nb Max retries: 5

Document Repository Domain: Document

OK Cancel Help

Supervisor – Creating a user

- Each user must be assigned to a group
- By default, placed in the root group



Supervisor – User properties

User Properties - blg

Definition Groups And Profile Timestamp

The Definition tab specifies a user name and password which the user must enter when starting a BusinessObjects application.

User

Name: blg

Security

Password: xxxxxxxx

Confirm Password: xxxxxxxx

☐ Change Password At First Login

☐ Password Validity

30 Days

☐ Periodic Action

Identification Strategy: Full Checking

Properties

☐ Disable Login

☒ Enable Offline Login

☒ Enable Password Modification

☐ Enable Real Time User Rights Update

☒ Enable Delete Document

Object Security Level: Public

OK Cancel Help

- Set user rights
- Set password
- Set object security level (if used)
- Unlock users that have become locked – 3 login attempts

Group setup review

- When setting up a group specify
 - Parent group(s)
 - Users in group
 - Profile of users in group
 - Timestamp access
 - BCA

Supervisor – User Properties

- Groups and Profile tab:
All available groups appear in the left hand panel
- Different Profiles can be assigned to the same user in different groups

The screenshot shows the 'User Properties - blg' dialog box with the 'Groups And Profile' tab selected. The dialog has three tabs: 'Definition', 'Groups And Profile', and 'Timestamp'. A help icon and text are present: 'The Groups tab adds the current user to a defined user group. The Groups tab also lets you remove a user from a group.'

On the left, under 'Available groups', there is a list box containing 'AMS'. To its right are buttons: 'Add >>', '<< Remove', 'Up', and 'Down'.

On the right, there is a table with two columns: 'Profile' and 'Group'.

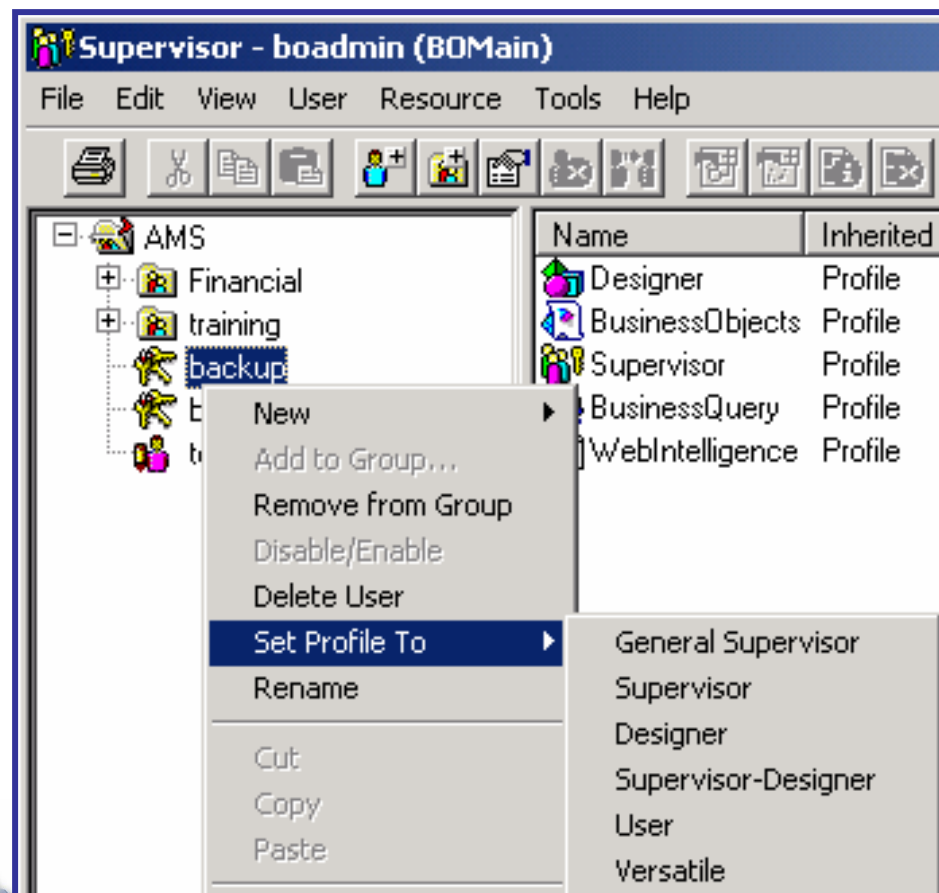
Profile	Group
User	Finance

Below the table, there is a 'Profile:' label and a dropdown menu currently showing 'User'. Below that is a checkbox labeled 'Group Reference' which is currently unchecked.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Supervisor - Changing User Properties

- After setup of groups/users can change the properties by right clicking the group/user and choosing Properties



Supervisor – delete users

- Two ways to delete users
 - Remove from a specific group
 - Ex. Delete sml from Finance group only
 - Delete user from all groups
 - Ex. Delete sml from Finance and HR groups

User setup review

- When setting up a user specify:
 - User password (if necessary)
 - Groups
 - Timestamp



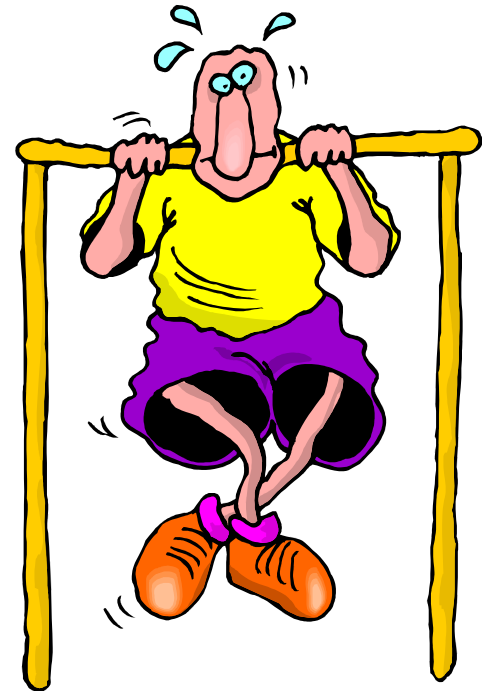
Exercise

Create 4 new groups

1. Dept01[LAST NAME]
 - For example: Dept01SMITH
2. Dept02[LAST NAME]
3. Managers[LAST NAME]
4. General[LAST NAME]

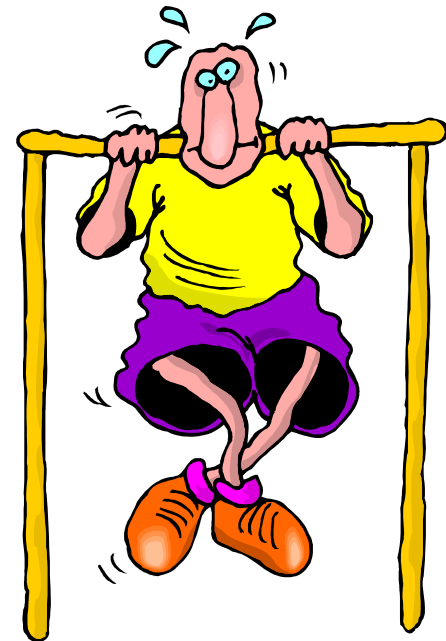
Create 5 new users & set everyone's pwd to 123

1. 01MGR[LAST NAME]
2. 02MGR[LAST NAME]
3. 01GEN[LAST NAME]
4. 02GEN[LAST NAME]
5. SUP[LAST NAME]



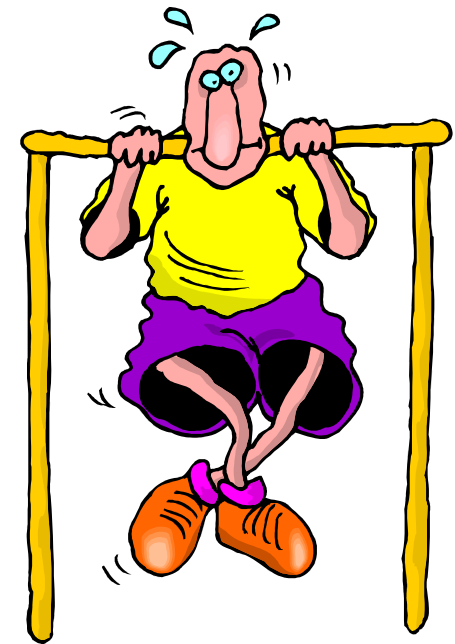
Exercise - Continued

- **Place Users in groups**
 - Dept01 group has 01MGR, 01GEN
 - Dept02 group has 02MGR, 02GEN
 - Managers group has 01MGR, 02MGR
 - General group has 01GEN, 02GEN
- **Assign correct roles**
 - Dept01: 01MGR is a Supervisor
 - Dept02: 02MGR is a Supervisor
 - Managers: 01MGR is a User
 - Managers: 02MGR is a User
 - General: 01GEN is a Versatile
 - General: 02GEN is a Versatile
 - SUP is a General Supervisor



Exercise - Continued

- Try logging in to Business Objects (Thick Client) using one of the new user ids with correct pwd
- Logout
- Try logging in 3 times to Business Objects using new user id and WRONG pwd
- Open Supervisor and unlock user (double click on locked user and uncheck disable login)
- Login to Business Objects with correct password



Permissions



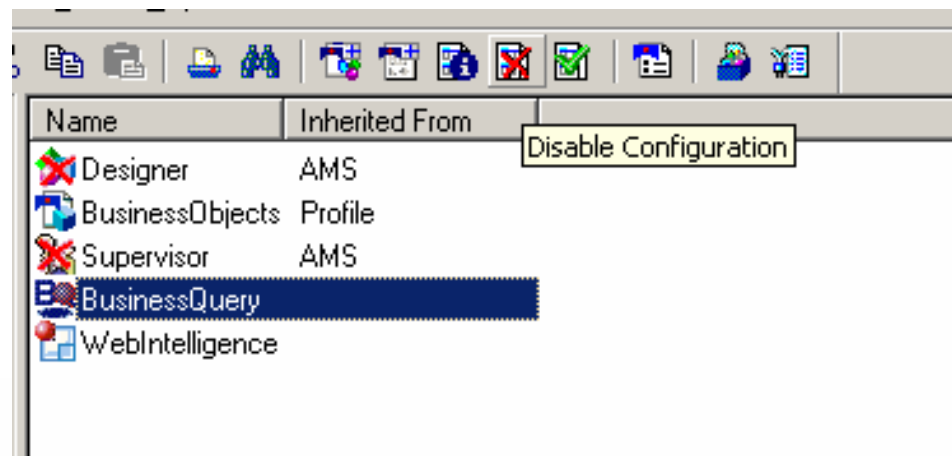
Configuration Tab

- Determine which tools a user/group can access
- Once disabled, the user/group will not have access to the tool
- To re-enable a restricted tool, you would select Disable/Enable again
- A red circle, with an X in it appears on the disabled tools



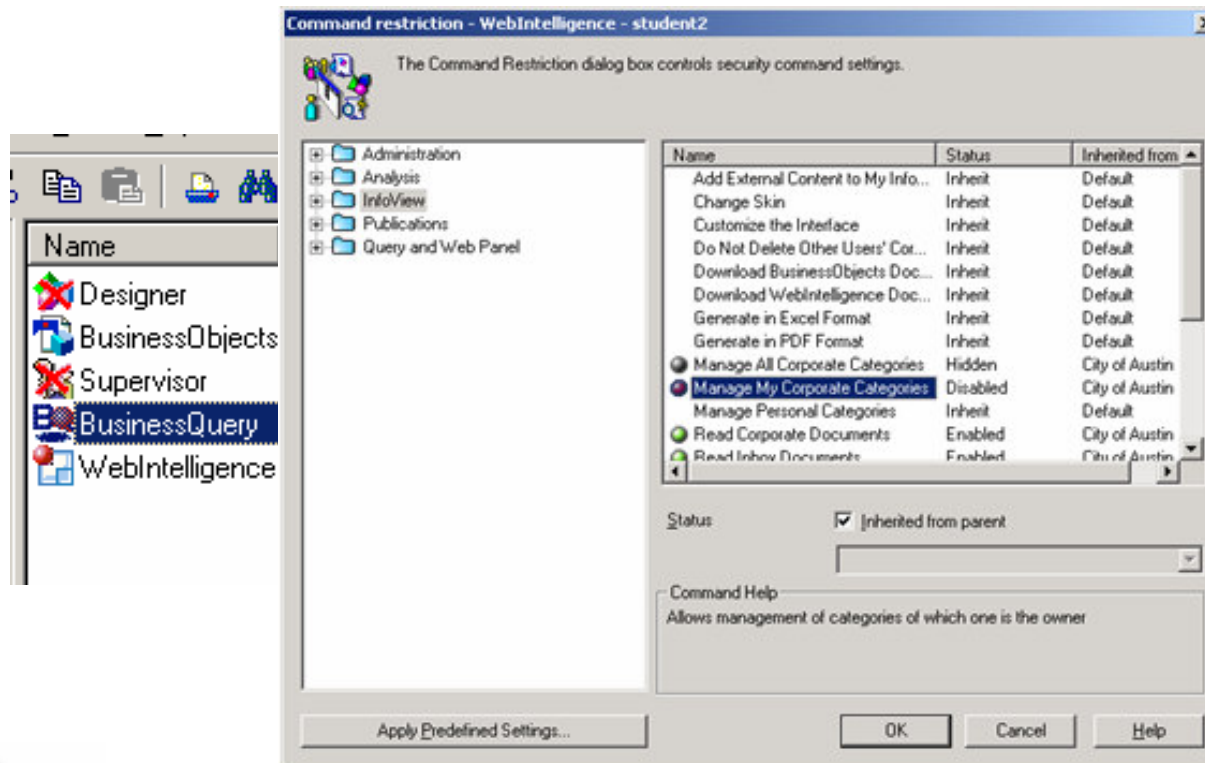
Configuration Tab

- Enable/disable access to tools per user (group)
- If a menu command is disabled or hidden for a group, then it is disabled or hidden for all users in the group or that inherit from that group
- Overrides can be applied to users or sub-groups
- The user/group selected in Left hand panel will be the level at which restriction will be applied

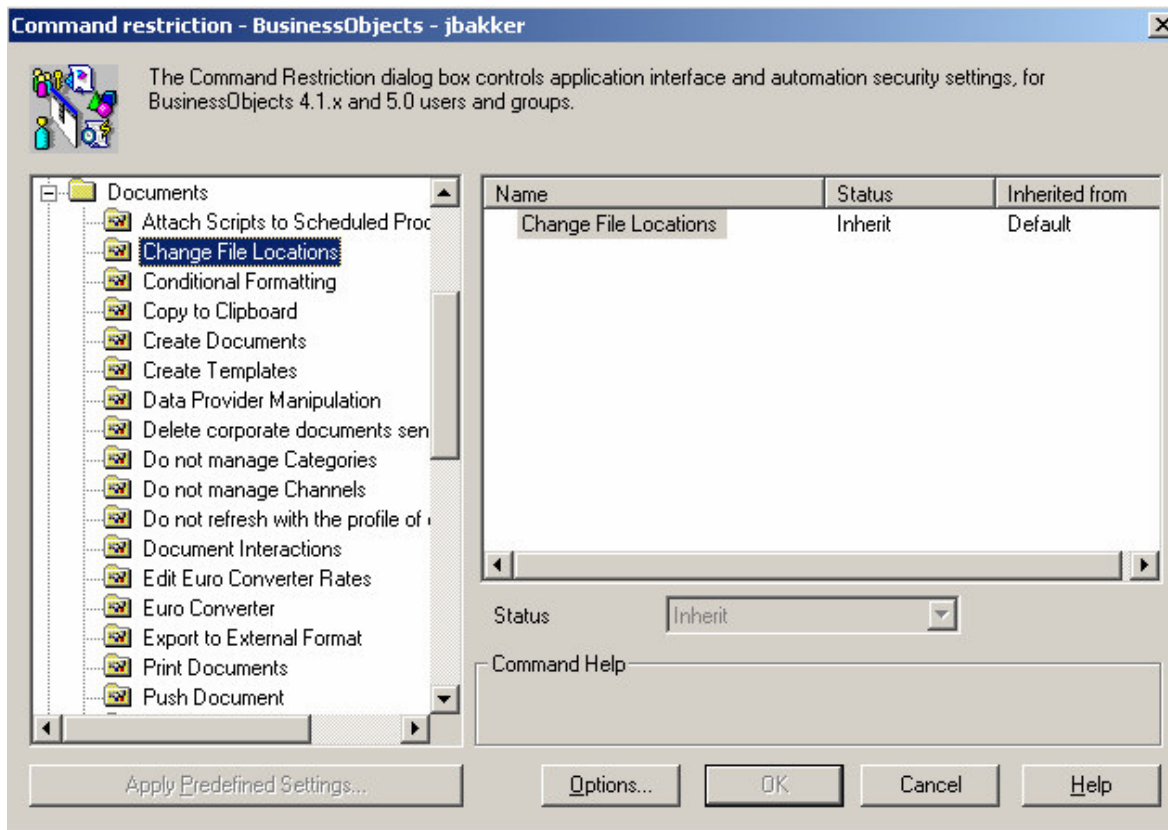


Command Restrictions

- Double clicking on an application in the configuration tab displays a specific list of actions that can be enabled/disabled for a particular user/group



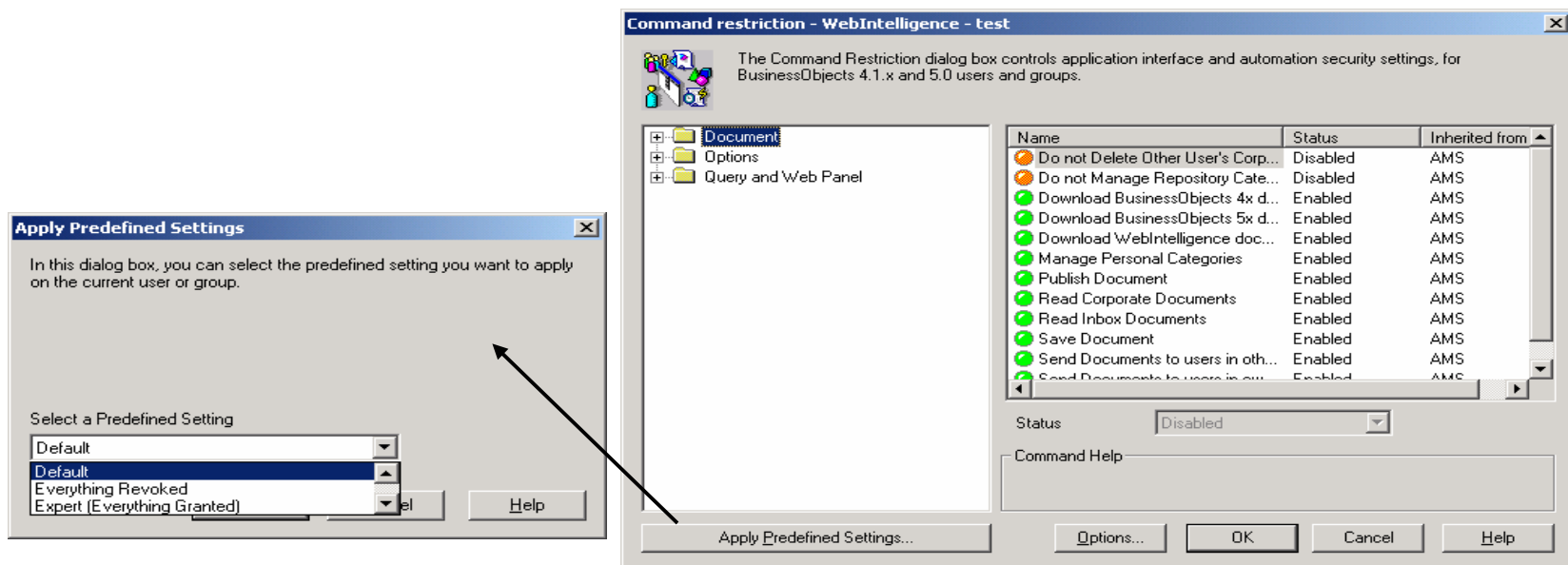
Command Restrictions



- Tool is enabled for user, but not all commands are allowed.
- Example: use WebIntelligence, but no report creation

Command Restrictions

- A red circle in front indicates operation is disabled
- A Predefined Setting consists of a grouping of command restrictions that have already been defined

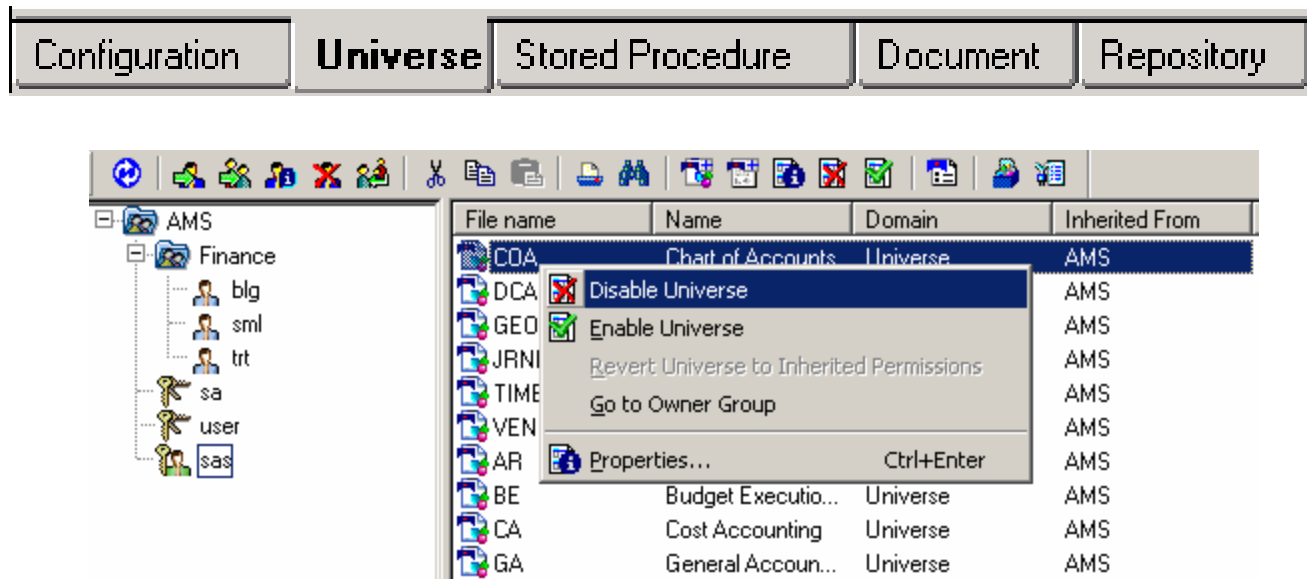


Universe and Report Management



Managing Universes

- Enable/Disable Universe for groups or users
- Prevents users from accessing data in other Universes

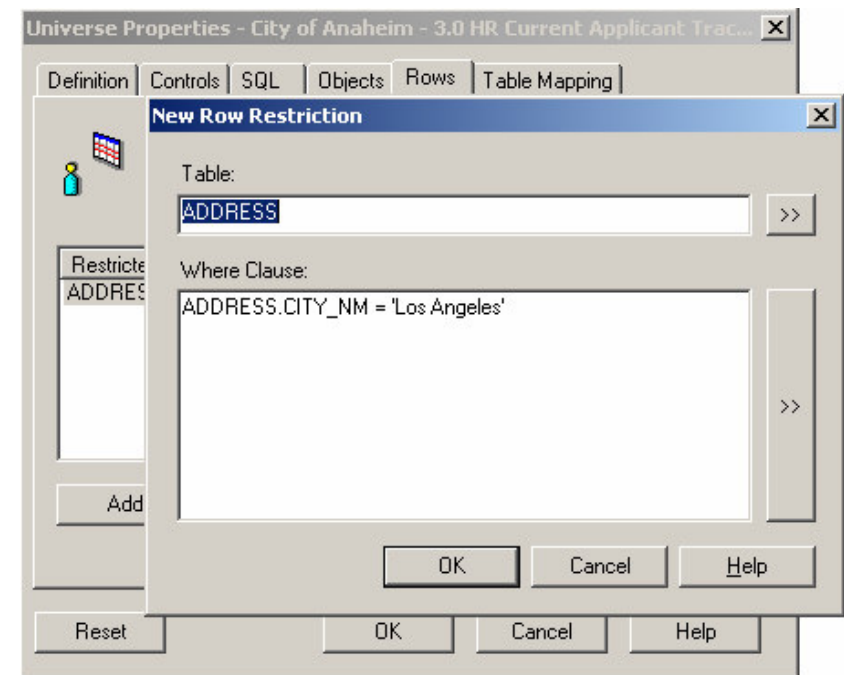
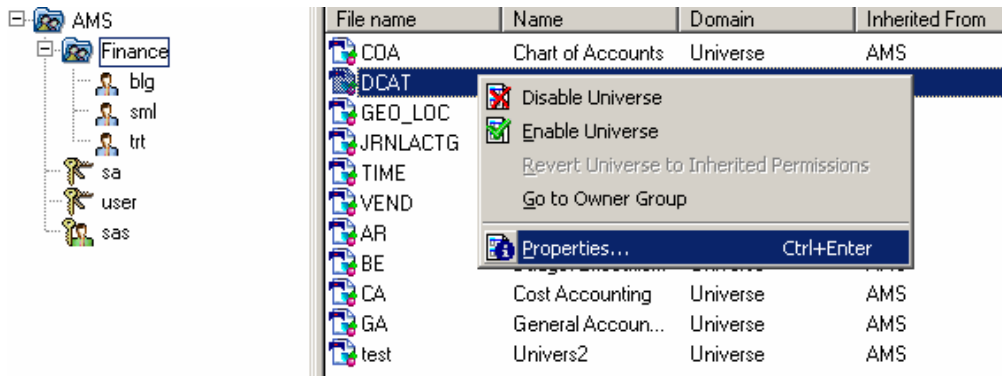


Managing Universes

- Universe is a collection of tables
- If a universe is disabled for a group users wouldn't be able to get data to run the report
- Be careful when deleting a universe!
 - Tools menu and select Delete Universe
 - Can't delete with delete key
 - Can only restore universe if backup exists
 - Consider disabling

Supervisor – Universe Management

- Object Level Security - limits the objects a that user can see or run a report against
- Row Level Security - restricts data in a table using the Where Clause



Supervisor – Stored Procedures

- A stored procedure is a combination of SQL statements that are translated, optimized, and stored in executable form on certain SQL servers. End users can execute stored procedures on the universes assigned to them by the supervisor.



Supervisor – Reports disabled/enabled

- Disabled documents can be re-enabled
- A red X indicates the document has been disabled
- Deleted documents can only be restored to the repository from a backup

Name	Type	Domain	Inherited From	Categories	Schedule
GA-05	Document	Document	sml		No
GA-06	Document	Document	AMS		No
GA-07	Document	Document	sml		No
GA-08	Document	Document	AMS		No
GA-09	Document	Document	AMS		No
GA-10	Document	Document	sml		No
Example Repo...	WebIntelligence...	Document	AMS	Training	No
GA-01 Detailed	Document	Document	AMS		No
GA-01 Summary	Document	Document	AMS		No
GA-02 Detailed	Document	Document	AMS		No
GA-02 Summ...	Document	Document	AMS		No
GA-03	Document	Document	AMS		No
GA-04	Document	Document	AMS		No

Supervisor – Report Categories

- Report categories are used to organize reports
- Category can be chosen when report is published
- Categories often follow functional areas
- Documents can have no categories or multiple categories
- Supervisor can allow a different user to create categories

Exercise

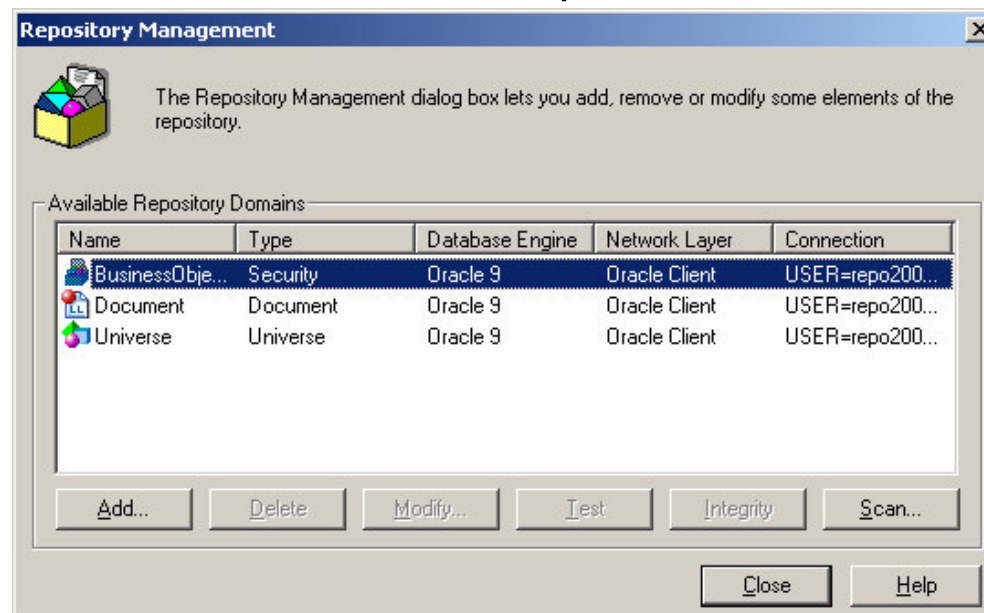
- Add the following Row Level Restriction to Group Dept01- JRNLACTG
 - Table: FACT_JRNL_ACTG Where:
FACT_JRNL_ACTG.AR_DEPT_CD = '01'
- Add the following Row Level Restriction to Group Dept02 – JRNLACTG
 - Table: FACT_JRNL_ACTG Where:
FACT_JRNL_ACTG.AR_DEPT_CD in ('02','03','CC')
- Add the following Object restrictions to Group General – JRNLACTG
 - Vendor Information – Vendor Code
 - Vendor Information – Check Number
- Select Group General Disable GA-10
- Select User 01GEN in Group Dept01 Disable Universe Domain
- Add a new Document Category LASTNAME FIRSTNAME
- Select 01GEN user in General Group- Enable: Create Documents, Edit Documents and View SQL for the WebIntelligence application

Repository Management



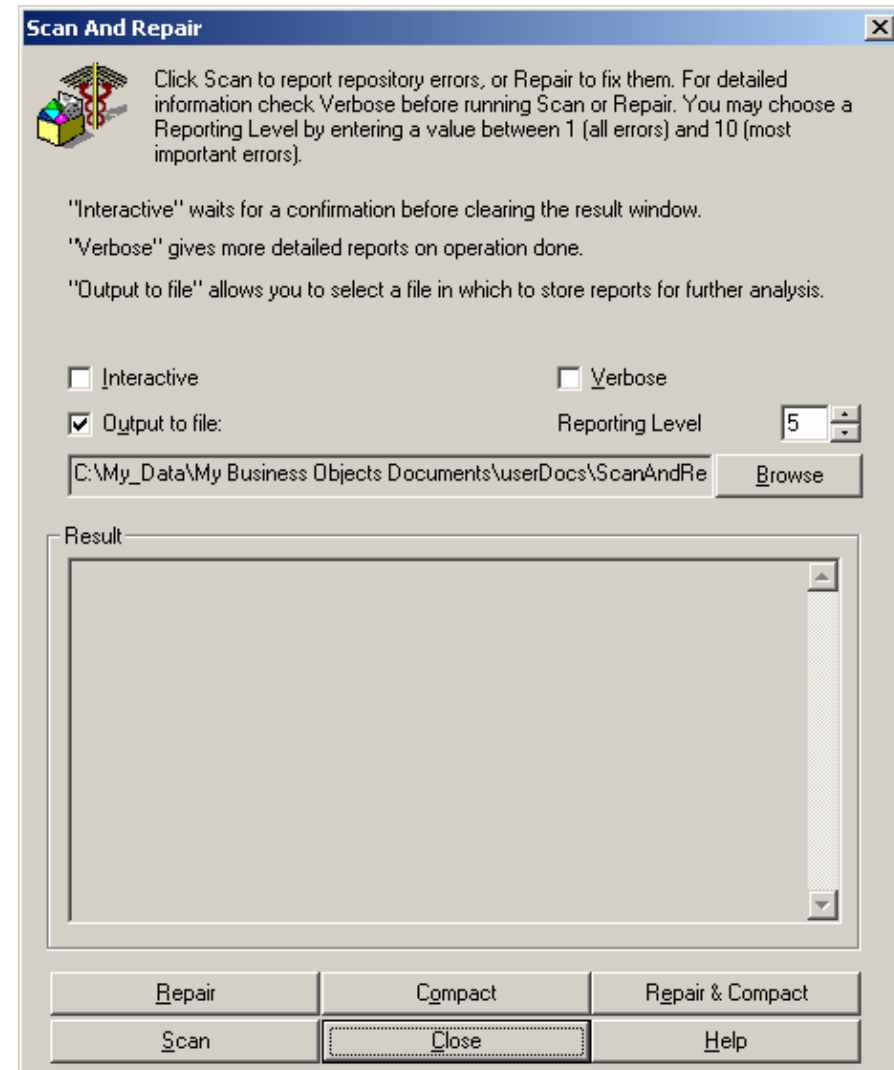
Supervisor – Repository Management

- A Domain is a set of tables in the Repository database that is dedicated to a certain function. The three domains included during a standard installation are as follows:
 - Security – Stores User and Group information as well as permissions
 - Universe – Stores Universes published to the Repository
 - Document – Stores Documents published to the Repository



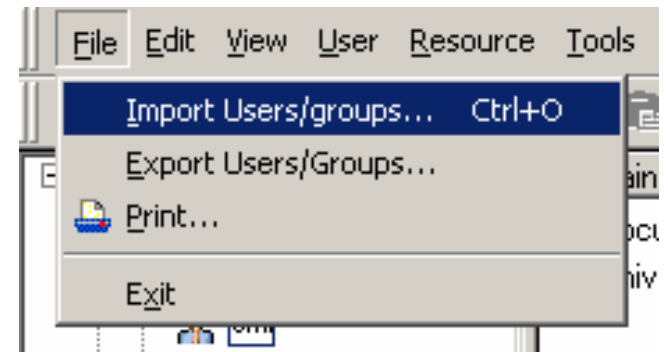
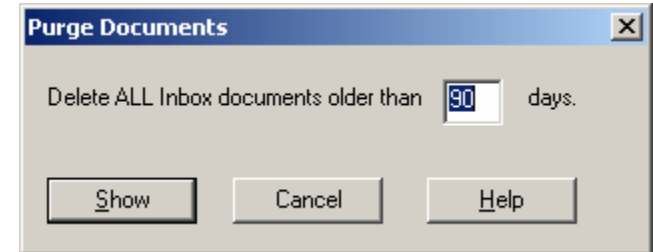
Supervisor – Repository Management

- Scan and Repair are functions that check the integrity of the Security and Document Domains
- Scan and Repair can be used for routine maintenance or for solving problems
- Compact is a function for the security domain and it should be performed only when necessary
- Scan will produce a report listing any domain errors
- Repair will scan the domain and flag any errors for deletion
- Compact compresses the contents of the security domain and deletes any rows flagged for deletion



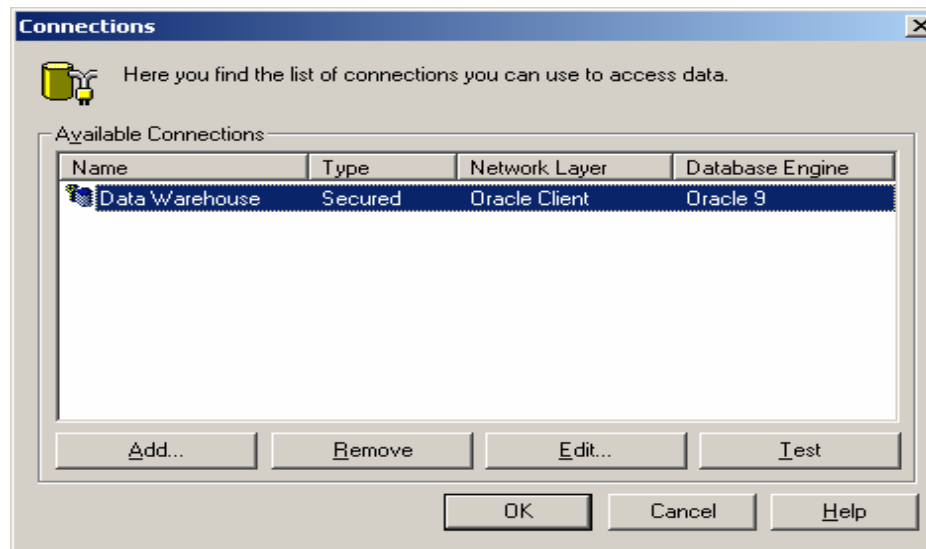
Supervisor – Repository Management

- Purge documents
 - All inbox documents older than ... deleted
 - Users “pick” up their mail when they log into Webi
 - Documents that have been mailed and not picked up need to be managed
 - Purge Inbox Documents deletes any document that has been sent to a user but never opened
 - Does not delete the sender’s copy of the document, only the recipient’s copy
- Import/Export User/Groups
 - Back ups
 - Information exported to a text file



Supervisor – Repository Management

- A connection describes the information for Business Objects to connect to a reporting database
- The database must be defined in a corresponding client connection (ODBC or Oracle Client)



Summary

- Users and Groups
 - Defining
 - Define properties
 - Assign profiles
- Permissions
 - Enable/Disable tools
 - Command restrictions
 - Predefined settings
- Universe Management
 - Enable/Disable Universe
 - Delete Universe
 - Object and row level security
- Document Management
 - Enable/Disable documents
 - Delete documents
 - Categories
- Repository Management
 - Domains
 - Scan, Repair, Compact
 - Purging Inbox
 - Backups
 - Defining connections

Exercise

- In Supervisor:
 - For Group General Disable report GA-10
 - For User 01GEN in Group Dept01 Disable Universe Accounts Receivable
- Try to run report GA-10 while logged in as 02GEN, a member of Group General
- Click on 'create documents' when logged in to Thin Client as '01GEN'.

Exercise

- Login to Thick Client using student login
- Create thick client report in AR
 - Fields: Posting Code – Posting Code
 - Accounting Journal – Posting Amount
 - Vendor Customer Headquarters – Headquarters Account Code
 - Run query
 - Save report
- In Supervisor:
- Add the following Row Level Restriction to Group Dept01- AR
 - Table: DIM_PSCD Where: PSCD_CD = 'A001'
- Add the following Object restrictions to Group General – AR
 - PSCD_CD
- Login as member of Group Dept01 and run report saved in second step
- Login as member of Group General and try to create same report.

Supervisor – Questions?

